

Exercise Guide for
WF220
BEACON SAP Workflow



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3.1 – Exercise: Change Priority and Approve a Position PCR




Scenario

A Position Reallocation PCR has been sent to your Inbox. Review the PCR and accompanying note. Change the priority from medium to very high, and then approve it. In this exercise, you are the OM Division/Agency Approver.



After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

Instructions—Change Priority and Approve PCR

1. Log onto SAP using the **Division/Agency Approver** user id and password.
2. From the Easy Access screen, click **SAP Business Workplace** .
3. Click the node beside Inbox  to expand it.
4. Double click **Workflow**. The PCRs that have been sent for approval are listed in the right column.
5. Click  to update the screen. This ensures that the most current PCRs that have been sent to the Inbox display.
6. Select the applicable PCR.
7. In the bottom section of the screen, scroll down and click the link for the OM_Header PCR - <pcr number> Position <position number>. The PCR Position Action Request screen is displayed. Observe there are three tabs (General, Time, and Cost).
8. Click each tab and review the information. Observe that you can view each tab but cannot make any changes to the data.
9. Click **Services for Object**  to review any attachments (or notes) that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
10. Select **Attachment List**. The Services: Attachment list pop-up displays.
11. Highlight the line item for the note, and select **Display** . The Display note pop-up is displayed with the note title and note information.
12. Click  to close the Display note pop-up.
13. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.

14. Click the back button  to return to the Workflow screen. The Complete Workitem window is displayed.
15. Click the **Cancel and keep in work item inbox** option.
16. With the applicable PCR still highlighted, click **Other functions** .
17. Select **Change priority**. The Change priority pop-up displays.
18. Use the drop-down in the Priority field to select the **very high** option.
19. Indicate that the selection should continue with subsequent steps.
20. Close the pop-up box.
21. With the applicable PCR still selected, click **Execute**  (or double click the PCR line item).
22. Click **Approve Change**. Observe that you can also cancel the PCR and keep it in your files, send it back to the Initiator, or send it to OSP.
23. Click the **Exit** button to return to the Easy Access screen.

Instructions—View Workflow Tracker

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the node beside **Outbox** to  **Outbox** expand it.
3. Double-click **Workflow items executed by me**. The PCRs on which you have taken action (approved, returned or cancelled) are listed in the right column.
4. Select the PCR you want to review.
5. In the bottom section of the screen scroll down and click the link for the **PCR_List: Workflow Tracker**. The Workflow action screen is displayed.
6. Review the screen for details for the Approvers, including the Approver roles as well as date and time processed.
7. Exit the Workflow Tracker back to the Easy Access screen.







This exercise is complete



3.2 – Exercise: Reserve a Position Change PCR

Scenario

You have received a PCR to change the county of a position. When you review the PCR and the accompanying note you believe the wrong county has been selected. Use the Reserve function to remove it from Workflow until you complete your research. In this exercise, you are the OM Division/Agency Approver.

Instructions—Reserve the PCR and View the Workflow Log

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the node beside **Inbox**  to expand it.
3. Double-click **Workflow**. The PCRs that have been sent for approval are listed in the right column.
4. Click  to update the screen. This ensures that the most current PCRs that have been sent to the Inbox is displayed.
5. In the bottom section of the screen, scroll down and click the link for the OM_Header PCR - <pcr number> Position <position number>. The PCR Position Action Request screen is displayed. Observe there are three tabs (General, Time, Cost).
6. Select the applicable PCR.
7. Click each tab and review the information. Observe that you can view each tab but cannot make any changes to the data.
8. Click **Services for Object**  to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
9. Select **Attachment List**. The Services: Attachment list pop-up is displayed.
10. Highlight the line item for the note, and select **Display** . The Display note pop-up displays with the note title and note information.
11. Click  to close the Display note pop-up.
12. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
13. Close the Action Request screen and return to the Inbox.
14. Observe that next to the Display (eyeglasses) icon, there is an icon (Reserve). Also notice that next to the Reserve icon, another icon that looks very similar to Reserve is grayed out.

15. With the applicable PCR selected, click **Reserve** . You have now taken ownership of the workflow item and removed it from the general Inbox of the other Agents. Observe that the icon for Reserve is now grayed out, and the new icon (Replace) is active. You will use Replace when you are ready to put the PCR back into the group of Agents again. At this time, you decide that you still have more research to do, and so you are not ready to put the PCR back into Workflow.
16. Click the **Display Workflow Log**  button to view who the Agents are that were affected by you reserving the PCR.
17. Click the **Agents** icon to view the options. This allows you to see the Approvers who would have been able to approve the PCR if you had not reserved it.
18. Exit the Workflow Log back to the Easy Access screen.

This exercise is complete

4.1 – Exercise: Change Priority and Approve a Promotion PCR

Scenario



A PCR to promote Allison Sellers has been sent to your Inbox. Review the PCR and accompanying note. Change the priority from medium to very high, and then approve it. In this exercise, you are the PA Division/Agency Approver.

After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

Instructions—Change Priority and Approve PCR

Using information learned in a previous lesson, approve the PCR. After you have approved the PCR, use the instructions in the next section to view the Workflow Tracker.

Instructions—View Workflow Tracker

1. From the Easy Access screen, click **SAP Business Workplace** .
2. Click the node beside **Outbox** to  **Outbox** expand it.
3. Double-click **Workflow items executed by me**. The PCRs that you have taken action on (approved, returned or cancelled) are listed in the right column.
4. Select the PCR you want to review.
5. In the bottom section of the screen scroll down and click the link for the PCR_List: Workflow Tracker. The Workflow action screen is displayed.
6. Review the screen for details for the Approvers, including the Approver roles as well as date and time processed.

This exercise is complete



4.2 – Exercise: Reject a Salary Adjustment PCR

Scenario

A PCR to give a salary adjustment to Nancy Gonzalez has been sent to your Inbox. Review the PCR and accompanying note, and then reject it. You will be required to write a note explaining to the Initiator why you are rejecting the PCR. In this exercise, you are the PA Division/Agency Approver.

Instructions—Change Priority and Approve PCR

Using information learned in a previous lesson, complete the Exercise. **NOTE:** When you click the Return to Initiator button, a comments screen is displayed. Enter your comments to the Initiator and save. Click the back button to return to the Inbox.

This exercise is complete

4.3 – Exercise: Cancel a Suspension PCR

Scenario

A PCR to place Ronald Barr on suspension has been sent to your Inbox. After you view the PCR you decide that you need to research this request. You think the effective date should be earlier than the date on the PCR. After you review the PCR and accompanying note, use the Cancel function to remove it from Workflow until you complete your research. In this exercise, you are the PA Division/Agency Approver.

Instructions—Reserve the PCR and View the Workflow Log

1. Find the applicable PCR and review the note.
2. Observe that the Reserve icon is active. Also notice that the Replace icon is grayed out.
3. With the applicable PCR selected, execute the PCR.
4. Select the Cancel and keep work item in inbox option. You have now taken ownership of the workflow item and removed it from the general Inbox of the other Agents.
5. Observe that the icon for Reserve is now grayed out, and Replace is active. You will use Replace when you are ready to put the PCR back into the group of Agents again. The use of the Cancel and keep work item in inbox function is the equivalent of using the Reserve and Replace icons.


This exercise is complete

4.4 – Exercise: Replace PCR and Approve or Send to OSP

Scenario

You have finished researching both the Position Reallocation PCR and the Suspension for Ronald Barr. You determined that both PCRs as originally submitted were correct. Place the PCRs back into the workflow. You will approve the Position PCR and send the Suspension PCR to OSP.

Instructions—Replace and Approve the PCR

1. With the applicable PCR selected, click **Replace** . You have put the PCR back into the general Inbox of the other Agents. Replace both PCRs.
2. Place both PCRs back into your Inbox. Using information you learned in previous Exercises:
 - a. approve the Position PCR
 - b. send the Suspension PCR to OSP

This exercise is complete

Optional Exercise only for Funding Approvers

NOTE: The following exercise will only be performed in class if there are Funding Approvers present.

Scenario

You have received a PCR to change funding for a Position. Access the PCR and review the note as well as each tab. On the Cost tab, you will indicate that the position has split funding.

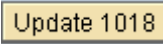
Change Funding % of Position of Richard Alston
Cost Centers 4610000000 and 4610100000
Orders 100000005374 and 100000005364
Funds 461230001 and 461110001

Instructions—Approve PCR

Use the information you learned in previous exercises to:

- Find the applicable PCR in your Inbox.
- View the note.

To change the funding, use the following steps:

1. At the Funding screen, click the **Cost** tab.
2. Click . The Budget Distribution pop-up is displayed.
3. On the original cost center line (**4610000000**) change the percentage to 70.
4. On the second line, enter the second Cost Center: **4610100000**
5. Enter the second Order number: **100000005364**.
6. Enter the funding: **461110001**
7. In the percentage field enter: **30%**.
8. Press Enter.
9. If necessary, enter the salary: **\$23,765**.
10. Enter the reason for the change: **Source of funds change**.
11. Close the Budget Distribution pop-up.
12. **Save**.
13. Click the **Back** button to return to the Maintain Position screen.

This exercise is complete.